



Some results from the
IsiCult - Mediaset project

"Italy: a Creative Media Nation"

23 November 2011
Brussels

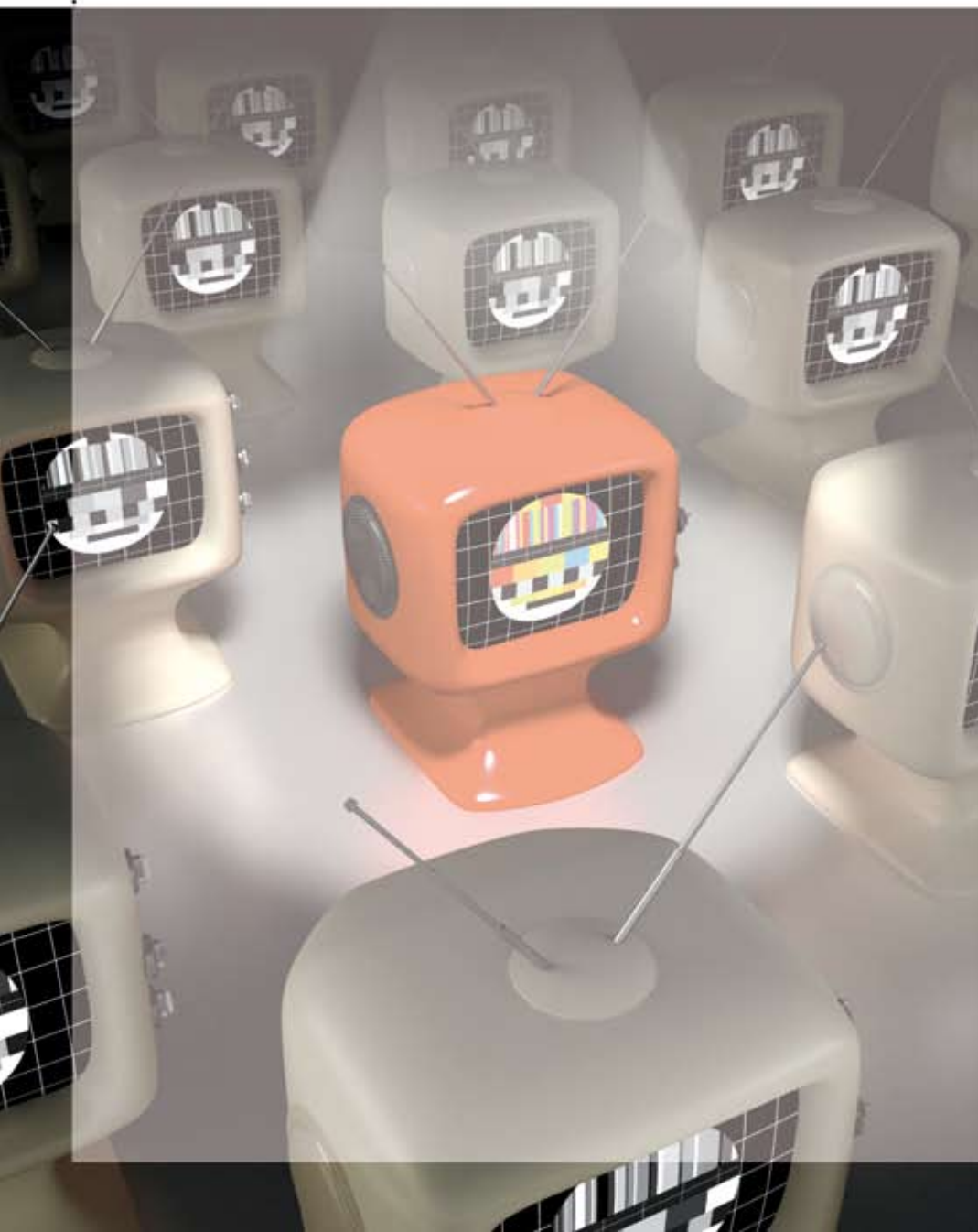


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Genesis

The project "**Italy: a Creative Media Nation**" is an initiative of the **Mediaset Group**, but in a wider pan-european project supported by the **Act** – Association of Commercial Television in Europe.

IsiCult is an independent research and advice centre, founded in 1992.

IsiCult has Rai and Mediaset as its honorary members. Among its clients there are Mpa and Ebu.





Objectives

- to provide reliable **data** and accurate analyses **to judge the role of TV within creative industries**, both in terms of national economic and social development;

- to prove the fallacy of the idea that "the Internet is free and magic" and **underline the importance of the copyright law** and of the actual business model based on it. **This model** has guaranteed and still **guarantees the production of high quality content**.

The critical question nowadays is: **what is the online business model for quality content production?**





According to the content, the **Internet economy** produces parasitic income and **does not invest in quality content.**

Tv is often given for granted in our everyday life, as if it existed in nature and wasn't in fact the result of a mix of energies, resources, investments, both in the economic and artistic field.





Methodology

The research is a result of a mix of **academic study** and **practical field work**.

It was carried out during **6 months**

(March-August 2011) with the collaboration of a **dozen of researchers** specialized in the socio-mediological, economical and juridical fields.





Television as the "super medium"

It emerges (from worldwide cultural statistics) that the medium of **television** remains **absolutely central** in the population's "media diets".

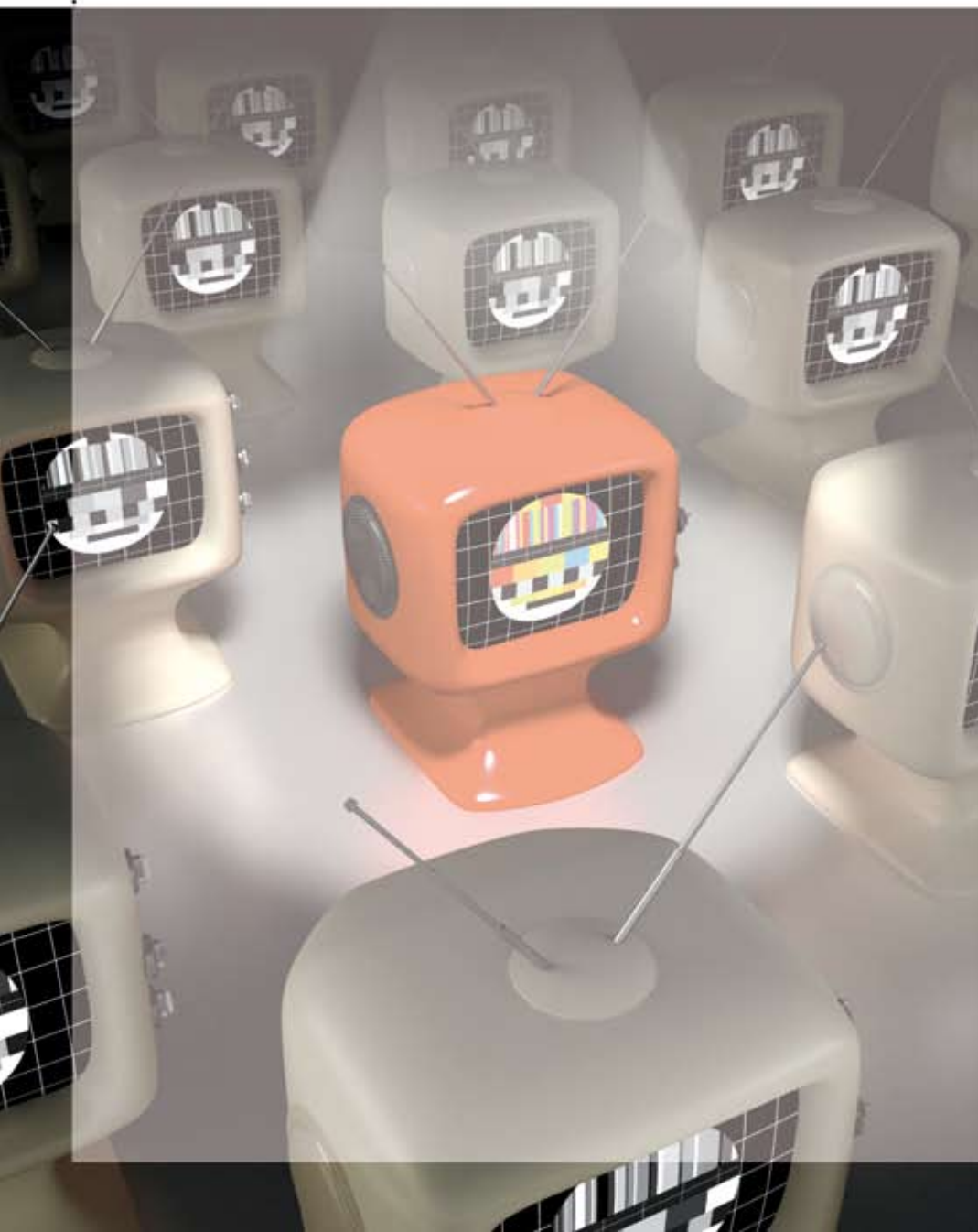
At a planetary level

TV has a potential audience of **3.7 billion people** and the average daily viewing time, in 2010, was **3 hours and 10 minutes**, a 6 minute-a-day increase over the last five years. Internet has instead a potential audience of 2 billion people.

At a national level

From **2000** to **2010**, the **Italian viewing public** has **increased** of about **1 million viewers** at every minute of the day, passing from 8.8 million recorded in 2000, up to 9.8 million viewers recorded in 2010.





Towards a "social television"

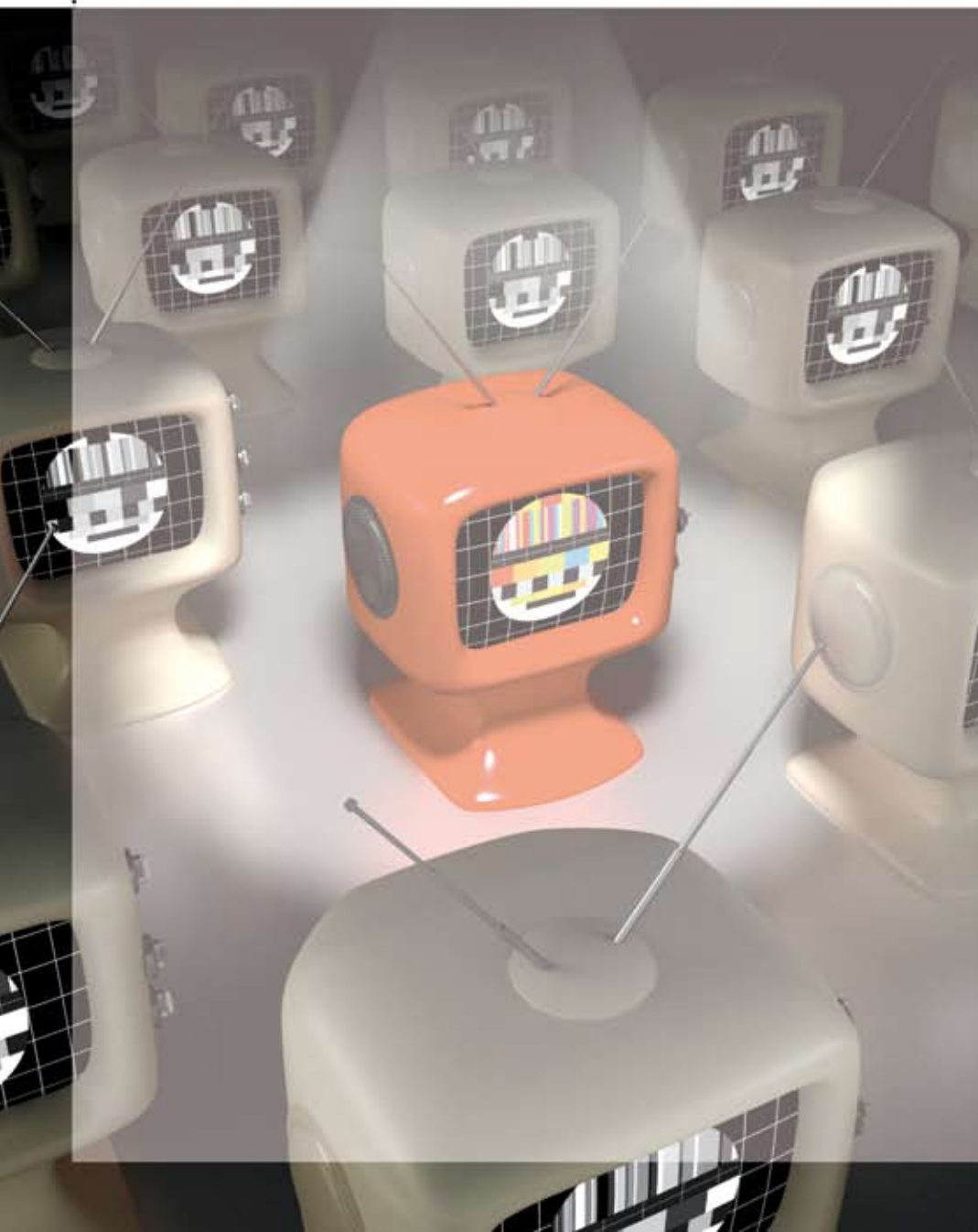
Digitization and the Internet are changing creative industries.

We are experiencing the **growing convergence** of this phenomena.

TV is much more present on the web, and many people now use the web to discuss about TV programmes.

We are going towards a "**social television**", or the contemporary fruition of TV programmes which are being discussed on the web by millions of viewers.



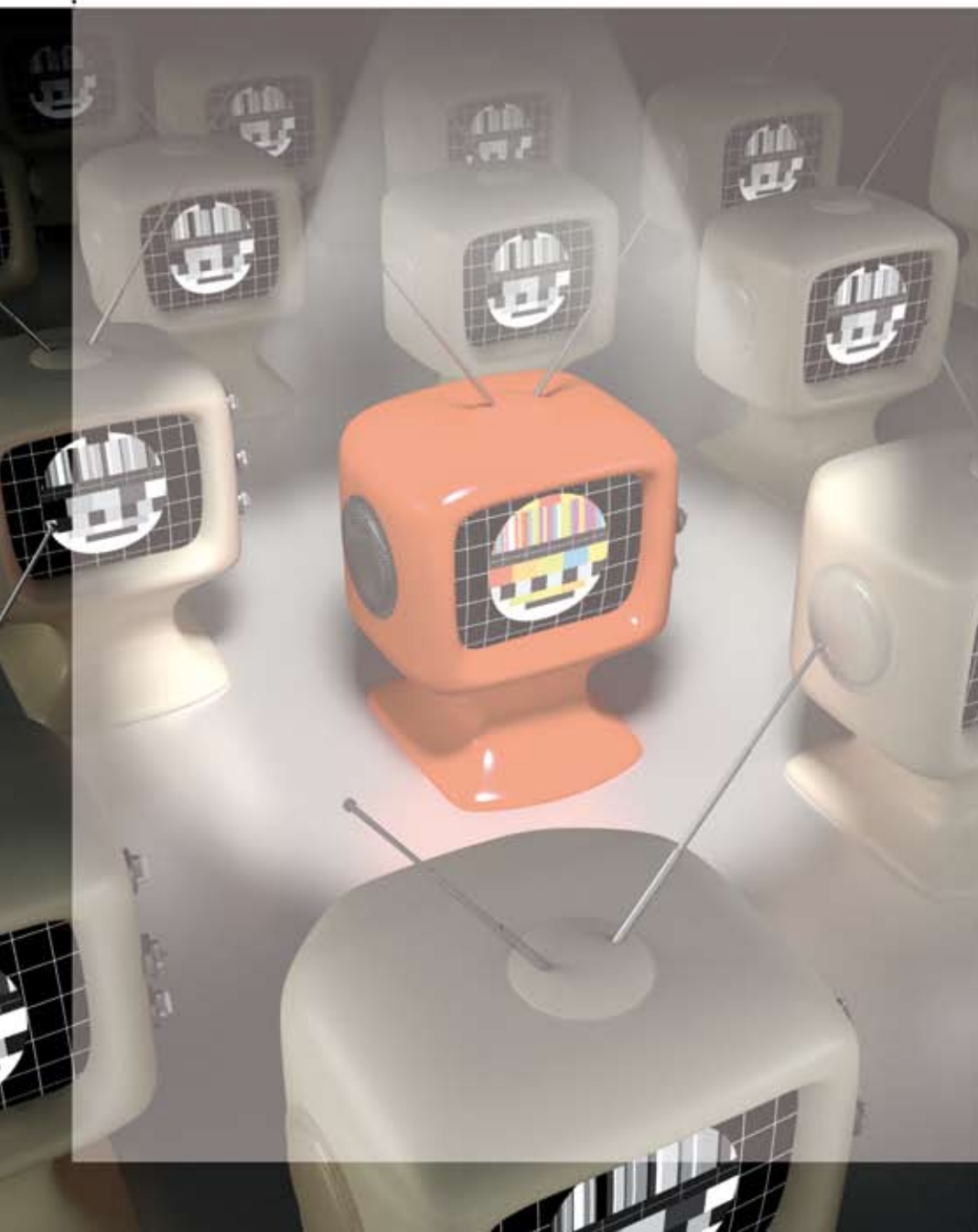


Towards a "social television"

Globally it can be observed that young adults (15-24 year olds) make continuously **greater use of alternative screens** but their **television time budget continues to increase**.

79% of Britons between 18 and 24 years of age have **used social networking site while watching TV programmes**, and no less than 42% of these "Internet viewers" use the web to share live comments on television programmes with friends.





The Myth of the "free" Internet

Internet is often considered as a sort of "multiplier of well-being", both material and immaterial. "The Myth of the free Internet" is just a myth. But let's see some data.

Actually, the **TV business model** has, and continues to **guarantee** occupation, work, salary, economical improvement and, first and foremost, **investments in quality content production**.

During the **last 10 years** the 2 Italian broadcasters, **Rai and Mediaset**, invested **€ 4.5 billion** in producing more than **7,200 hours** of Italian TV series.

In 2010 **Google Inc.** had US \$ 29.3 billion in turnover globally and about US \$ 8.5 billion in profits, but **did not invest**, even a single euro, in quality content.



KEY DATA

- the daily average time that an **Italian** watches **TV** is **4 hours and 10 minutes**;
- **94%** of citizens **use television** to keep informed of political affairs;
- the **Italian audiovisual industry** produces value, every year, for about **€ 12 billion**;
- the **audiovisual sector** in Italy represents about **1% of GDP**. This sector employs about 50.000 workers in a sector of about 12.000 companies;
- the **Italian TV broadcasters invest** about **€ 800 million**, every year, in TV series and other TV genres. Then there are another **€ 1,500 million** of "in house" production;
- TV networks assign about **€ 200 million** a year for the production of **Italian films for cinema**. Thanks to this investment, Italian films are responsible for more than 30% of box office entries.





KEY DATA

- in Italy the **audiovisual sector** produces, every year, about **€ 25 billion**;
- if we consider the fashion and tourism sectors to be among the creative industries, we can say that the **national cultural sector** in Italy produces about **€ 230 billion** each year;
- **1 euro in 6** of the Italian GDP comes from the cultural industries sector;
- every year the **piracy takes off** about **€ 500 million** from the audiovisual sector;
- in 2011, the average **Italian viewer** has over **70 channels** at his disposal **through DTT** (51 free, 21 pay);
- **TV** is also an **engine** for technological innovation: in **2010**, more than **7 million flat screen** televisions were sold producing a turnover of **€ 3.4 billion**.



It's fundamental:

- to **improve** the **protection** of the copyright system;
- to **safeguard the employment** in the artistic and cultural sector: in a word, **creativity**;
- to avoid risks for the **copyright business model** that is still nowadays **concrete and valid** and which guarantees the protection and production of quality content;
- to **fight piracy** in a way mainly based on educating to positive behaviour. It is necessary to **find a way at a European level**, and, possibly, an alternative to a coercitive French model based on Hadopi;
- to **protect the creativity** and invest in the creative sector can be also a correct way to contrast the economic crisis.





To every technological revolution a conflict corresponds between those who defend the Intellectual Property Right and those who accuse them to brake the progress...

A sort of endless conflict between the so-called "releasers of knowledge" and the so-called "abusers of rights".

A "win-win scenario" is possible only if based on the centrality of the cultural industries.





The project continues on:

www.italycreativemedianation.org
www.italymediacreativenation.org

Thanks for your attention !

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